

Legal Matters Management System
Addendum No. 1
Dated July 11, 2013
RFP No. 12-13/P106

This addendum is hereby made a part of RFP No. 12-13/P106 and it shall amend the said document in the following respects:

The County of Maui has provided responses to questions submitted by prospective vendors for this RFP.

Legal Matters RFP 12-13/P106 Vendor Questions

Is a hosted/cloud solution preferred by the County of Maui?

We would consider a hosted/cloud solution.

How many in-house users will there be for the system?

There are 35 staff in the Corporation Counsel department and there could be up to 15-20 additional users in other county departments.

How many vendors/law firms does the County of Maui work with? Is there an interest in giving the vendors access to the system, for Matters they may be associated with?

Currently 4 special counsels are assigned, yes, access may be granted to special counsel.

Is GroupWise the current email system being utilized by the County of Maui? Is the County currently satisfied with GroupWise? Or is the County's vision looking forward for a replacement of GroupWise?

Yes, yes and there is no replacement for GroupWise in the County 5 year IT plan.

Does the County of Maui require on-site training, or will on-line through web meetings be acceptable?

On-site training initially is preferred. Online updates seem reasonable.

There are questions in the Functional Requirements that pertain to cost analysis (2.2.01.02 & 2.2.01.12). Does the County of Maui want to use the system for eBilling (counsel submission of electronic invoices) as well?

Typically we do NOT bill others for costs but must keep track of our hours and costs.

If yes, does the County of Maui have an estimated outside Legal Spend from 2012?

N/A.

Would there be an interest to interface with the current AP/Finance system to automate payments to vendors and outside counsel? What AP system is currently used?

Not now but maybe in the future.

2.2.02.03 – Document Mgmt interface with AX. Our software provides security which is based on a combination of matter and user security profiles. Will that need to be replicated in AX?

No.

2.2.03.02 – Integration with the local court calendar. Is this for viewing purposes only? Does the local court allow this? Is County of Maui sending data to the court calendar currently?

We review the local court calendar daily, currently we get the calendar via fax. We do not update the court's calendar.

Is this project replacing both the in house developed database and Time Matters?

Yes.

Any plans to standardize on Microsoft Word within the department?

Not currently.

Requirement 2.2.11.01: Can more information about the current database such as table/field layouts be provided to help determine a level of effort for data conversion? Is a conversion from Time Matters required?

The current matters are cataloged and tracked by case name. Yes we want to convert what is currently on the Time Matters calendar.

Requirement 2.2.11.01: Are links to documents stored within the database?

No.

Requirement 2.2.02.03: Can you provide an overview of your vision of the integration with AX document management system. Would a replacement document management system that is part of the matter management product be considered?

The new system will have the supporting documents for a matter, case, party or attorney stored in the AX document management system. Yes another document management system could be considered. We expect the proposed document management solution would either use AX or be a better solution.

Form OF-2 is mentioned in the RFP, but does not appear to be a part of the RFP document. Can this form be provided?

In the RFP, Attachment 2 is that form.

In requirements item 2.2.02.03, is the County's long-term solution include the AX document management system? Or is the County looking for alternate solutions for comprehensive Enterprise Content Management (ECM) systems?

We will not be replacing the current AX document management system.

In requirements item 2.2.03.02, can we get documentation on your local court calendar? Enough documentation to understand possible solutions for integration.

We have attached two pages of a recent local court calendar.

Common Matters in Opinions, Bills, Resolutions, Communications, Complaints, Litigations, Contracts, Policies, Procedures, Event Recording, News Clips and videos, Articles, Readings, Information and Knowledge are spread amongst many agencies (e.g. Corporation Counsel, Office of City Clerk, Council Services, Mayor's Office, all Departments and Agencies). Commonality in processes are also evident amongst agencies. Would the County be interested in a Comprehensive Matters Management System shared by all agencies in the County?

Without a further detailed explanation the answer is perhaps.

What is the budget for the initial project period (60 months) of this project?

We certainly do not plan our software budget out 5 years in advance.

Is there a vendor that the Department of the Corporation Counsel currently utilizes for the existing in-house developed application? If so, is that vendor allowed to bid on this RFP? If so, who is the vendor?

No. N/A.

How many historical (past) matter requests and litigation actions will need to be imported into the new system?

As many as a few thousand matters may need to be imported.

How many historical (past) documents will need to be imported into the new system?

We have over 400 boxes in the archives.

Are all historical (past) documents already in an electronic form (i.e. MS Word, PDF, etc.)?

No.

Are the users all located in the same building?

If not, which geographical locations will the users access the system from?

How many users at each geographical location?

All Corporation Counsel is located in one building. Other county departments are on up to three different islands in Maui County.

Are there any users that will access the system from random remote locations and require VPN connections to the application?

Yes.

Will the new system replace both the Department of the Corporation Counsel's existing in-house developed application and the Department's homegrown (MS SQL database) web based system?

Yes.

Do you have a preferred software platform (i.e. Windows vs Linux)?

No.

Can the vendor propose a different database other than Microsoft SQL database?

Microsoft SQL and Oracle are currently supported, IT cannot support another database at this time.

Is Microsoft SQL Database must-have requirement?

No.

How many staff overall will be assigned to this project?

IT Staff

Non IT Staff

This answer depends totally on the work effort required.

Is the vendor required to supply all hardware for this project or will the state supply the hardware and the vendor only need to specify the hardware?

We will supply the required hardware.

Can vendors perform work remotely via remote access? Do you provide vendors with remote access such as VPN?

Yes. Yes.

Can you publish a list of vendors who submitted questions for this RFP?

No. Information regarding other bidders is not available until after the contract has been awarded.

Approval:

A handwritten signature in black ink, appearing to read 'Danilo F. Agsalog', written over a horizontal line.

DANILO F. AGSALOG
Director of Finance

Issued: July 11, 2013

RECEIPT

Receipt is acknowledged for Addendum No. 1 of the solicitation entitled "Provide Legal Matters Management System", RFP No. 12-13/P-106.

Please acknowledge receipt of this addendum by either mailing this receipt page to the Department of Finance, Purchasing Division, 2145 Wells St. Suite 104, Wailuku, Hawaii 96793 or by faxing to (808) 249-0839.

Received by:

SIGNATURE

NAME OF FIRM

ADDRESS OF FIRM

DATE RECEIVED

COURTROOM NO. 1
CALENDAR FOR FRIDAY, JUNE 28, 2013
THE HONORABLE RHONDA I. L. LOO PRESIDING

AT 8:15 A.M.

CR 13-1-0428	State of Hawaii vs. Nelson Waikiki Jr. BAIL HEARING
CR 13-1-0296 J Hura/M Kelley	State of Hawaii v. Nicholas O. Dotson 1) RETURN DAY FOR BAIL BOND FORFEITURE 2) MOTION TO SET ASIDE BAIL FORFEITURE
CR 97-0050 D Taira F Wilton (pro se)	State of Hawaii vs. Freedus W. Wilton II 1) DEFENDANT'S MOTION REQUESTING ENFORCEMENT OF FINAL JUDGMENT AND SENTENCE OF COURT 2) MOTION TO WITHDRAW
SPP 06-1-0007 R Rivera G Cordiero (pro se)	State of Hawaii vs. Gordon Cordeiro 1) MOTION TO AMMEND [SIC] SENTENCE RE REVOKE RESTITUTION AND CRIME VICTIM COMPENSATION FEE 2) MOTION TO APPOINT NEW COUNSEL 3) MOTION FOR DISQUALIFICATION
CR 12-1-0724 J Hura/J Brickey	State of Hawaii vs. Namon Kalani Parks CHANGE OF PLEA
CR 13-1-0110 E Olson/W McGrath	State of Hawaii v. Craig Bolter SENTENCING
CR 12-1-0335 J Hura/W McGrath	State of Hawaii vs. Dominique Keawe SENTENCING
CR 08-1-0624 CR 08-1-0626 T.Herndon/M Nardi	State of Hawai'i vs. Chaz Keola Tokunaga FURTHER NON-EVIDENTIARY TERMINATION HEARING (Stricken; continued to 7/5/13 at 8:15am via Stip prepared by M. Nardi)

AT 10:00 A.M.-12:00 P.M.

CR 06-1-0570 R Rivera H Aluli	State of Hawai'i vs. David Fleming FURTHER HEARING ON MOTION TO RECONSIDER ORDER REVOKING RELEASE ON CONDITIONS FILED SEPTEMBER 7, 2012, AND ORAL ORDER DENYING DEFENDANT'S MOTION TO AMEND PARAGRAPH "E" OF "SECOND AMENDED ORDER TO DETERMINE DEFENDANT'S FITNESS TO PROCEED FOR SENTENCING UNDER HRS CHAPTER 704," FILED ON AUGUST 27, 2012, ENTERED ON SEPTEMBER 4, 2012; AND MOTION TO REPLACE PATRICK McGIVERN, PH.D.
-------------------------------------	--

CALENDAR FOR COURTROOM NO. 1
PAGE 2

AT 1:30 P.M.

CV 11-1-0901
L Poelman/
K Wong

Leslie Perez v. Ross Dress for Less Inc., et al.
SETTLEMENT CONFERENCE

SP 08-1-0052
SP 08-1-0053
R Minatoya
C Dunn

Benjamin M. Acob vs. \$8,745.00 in United States Currency, et al.
Benjamin M. Acob vs. \$5,340.00 in United States Currency
1) FURTHER STATUS CONFERENCE
2) RESETTING OF JURY WAIVED TRIALS
(Stricken; continued to 9/27/13 at 1:30pm via Stip - prepared by R. Minatoya)

AT 2:30 P.M.

Cv 11-1-0203
M Johnston

County of Maui vs. Alex Lessin etal
STATUS CONFERENCE